

ASPEN LEADERSHIP GROUP

CHIEF PHILANTHROPY OFFICER
WINSTON-SALEM SYMPHONY
WINSTON-SALEM, NORTH CAROLINA



Aspen Leadership Group is proud to partner with the Winston-Salem Symphony in the search for a Chief Philanthropy Officer.

The Chief Philanthropy Officer will play a pivotal role in driving the philanthropic vision of the Winston-Salem Symphony (WSS) by overseeing the development, implementation, and management of an enterprising and strategic multi-year fundraising strategy designed to produce sustaining and transformational results. The Chief Philanthropy Officer will build and nurture relationships with current and prospective donors, ensuring high-touch stewardship practices that strengthen commitment and expand the donor base across demographic, geographic, and programmatic segments. The Chief Philanthropy Officer will spearhead innovative fundraising strategies, leveraging technology and performance metrics to maximize operational efficiency and effectiveness. A key part of the role involves recruiting and training board members and volunteers, fostering a culture of giving, and leading annual campaigns that meet or exceed fundraising goals. Additionally, the Chief Philanthropy Officer will collaborate closely with the President & CEO on the growth of major gift and planned giving initiatives, while overseeing all aspects of donor engagement, including cultivation, solicitation, and stewardship. With responsibility for managing an active portfolio of major donors, the Chief Philanthropy Officer will drive strategic initiatives, including major fundraising campaigns, partnerships, and events. By providing leadership to the philanthropy team and fostering a diverse, high-performance culture, the Chief Philanthropy Officer will ensure that the organization's philanthropic efforts align with its broader mission and objectives.

The Winston-Salem Symphony is one of the oldest and most respected professional arts organizations in the southeastern United States. Founded in 1946 as a civic orchestra on the campus of Salem College, the Symphony has grown into a nationally recognized regional orchestra with seventy-six professional musicians employed on a per service basis. It also boasts a volunteer chorus of over one hundred voices, an inspiring and robust music education program, and is committed to the power of community partnerships to enhance inclusion and accessibility. In addition to being lauded for its high-quality performances and excellent education offerings, the Symphony is recognized for its longstanding commitment to fiscal integrity; it is in a solid position when compared to other orchestras in the field and enjoys a loyal and expanding audience and patron base.

The Winston-Salem Symphony's **mission** is "to bring music to life." This simple statement embodies layers of meaning. Through its performance, education, and community engagement partnerships the Symphony aspires to realize its **vision** of a community where live music connects all people to inspire a more vibrant and creative region. The Symphony is committed to **values** including *creativity, innovation, and excellence* (in expected and unexpected places); *education* (through inspiring learning opportunities that enrich listening experiences, expand knowledge, and foster musicianship for people of all ages); *inclusivity* (serving the interests of the community by fostering inclusion and accessibility for all); and *financial sustainability* (maintaining the community's confidence through responsible stewardship of the public's investment).

Presently in its 78th season, the **Winston-Salem Symphony orchestra** is under the artistic direction of Michelle Merrill, whom the Symphony was delighted to welcome as its new Music Director in June 2023 following a highly competitive international search. The orchestra routinely performs thirty Winston-Salem Symphony concerts each year, augmented by a multitude of smaller ensemble performances throughout the region, performances as the pit orchestra for Piedmont Opera's two annual mainstage productions, and other contracted performance services. Its professional musicians trained at the University of North Carolina School of the Arts (UNCSA) and at other highly respected conservatories throughout the country. Half of the Symphony's musicians hold more than one advanced academic degree, and many have played with the finest orchestras in the country. Today, they share their gifts on the Symphony's concert stages and in its classrooms while serving — and often leading — the faculty at UNCSA, Wake Forest University, and the region's other respected university music departments.

The **Winston-Salem Symphony Chorus** traces its beginnings to the 1940s, through the merger of three former choral ensembles in the 1960s and became part of the Winston-Salem Symphony in 1971. Currently under the direction of Chorus Director Dr. Christopher Gilliam, the Symphony Chorus is an auditioned symphonic choir made up of volunteer singers, many of whom are professionally trained and who also sing professionally in the region and beyond. The Chorus combines annually with the orchestra to perform large choral masterpieces which in recent seasons have included symphonies by Mahler, Beethoven, and Bernstein, Haydn's *Creation*, Orff's *Carmina Burana*, Walton's *Belshazzar's Feast*, and the requiem masses of Brahms, Mozart, and Verdi. The Chorus also joins the Symphony on earlier, smaller scale works such as the Bach *Passions* and an annual production of Handel's *Messiah*. Additionally, the Chorus performs annual stand-alone concerts in local venues apart from the Symphony concert hall providing intimate and moving choral experiences for audiences.

Music education has been a key component of the Symphony's mission for over seven decades. The Symphony makes dozens of educational opportunities available to youth and adults each season as a way of enriching the community and engendering a love of music among all ages. Youth education programs include a mix of those that expose and those that actively engage young people in instrumental instruction.

The Symphony's largest **exposure-based youth education program** features **in-school ensemble visits** and a **full orchestra concert**. In-school ensembles representing the four families of instruments in the orchestra visit all fourth and fifth grade students in the Winston-Salem/Forsyth County School System (WS/FCS) during the fall. Programming ties to North Carolina's Standard Course of Study and national arts standards, and teachers receive a curriculum guide to help them prepare students for these visits and the full orchestra concert that follows. Fifth grade students then attend a full orchestra concert in the spring, where they then see how all the parts of the orchestra fit together. This concert takes place just before students register for middle school classes, which is the first time they can elect to participate in orchestra, band, or chorus. Over 8,000 WS/FCS students participate in this program, with the full orchestra concert also being open to additional private, parochial, and home-school students as space permits.

The Symphony recently added a new **Symphony Club** for middle school and high school students which provides interested students and a guest (a parent or friend) with access to all classical concerts, opportunities to meet the Music Director and guest artists, and social events around concerts for a very nominal fee.

The Symphony's **experiential youth education programs** include the Youth Orchestras Program and the P.L.A.Y. (Piedmont Learning Academy for Youth) Music Program. The **Youth Orchestras Program** presently serves over 175 talented young musicians from first through twelfth grade who win a seat in one of the program's four ensembles by audition. In addition to rehearsing and performing their own concerts (at least three per year per ensemble), students in the Youth Symphony (most advanced ensemble) also participate in an annual side-by-side playing experience with their adult counterparts in the Winston-Salem Symphony. Presented free of charge to the public, the "Concert for Community" features the Junior and Senior Division winners of the annual statewide **Peter Perret Youth Talent Search concerto competition**, and the premiere of the UNCSA student composition competition winner's new work.

The **P.L.A.Y. Music Program** is the Symphony's second experiential education program for young people. An El Sistema-inspired program, it presently serves over 360 students, primarily from under-served families and takes place in four elementary schools and one middle school — all but one of which are Title I schools. P.L.A.Y. Music students progress through increasingly more experienced teams from Team Mozart (beginning), to Beethoven, Brahms, Clarke, and Price. In addition to providing free instruments and instruction, young students also receive academic support (focused on literacy), and learn to develop critical life skills including resilience, discipline, responsibility, teamwork, empathy, and respect for themselves and others. The program cultivates future leaders through its "Maestro Mentors" peer mentorship program. Each team presents at least three performances a year, and all teams participate in an annual "Seminario" gathering that celebrates what each team has accomplished. To date, over thirty-five P.L.A.Y. Music students have also successfully auditioned into the Youth Orchestras Program, where they receive scholarships that ensure access to participation. A limited number of these students are also receiving donor-funded private lessons to encourage their continued participation in the Symphony's music programs, and in their school orchestras.

Adult education presently takes the form of "lunch and learn" events prior to each *Classics* weekend's performance featuring "Inside the Actor's Studio-like" casual conversations with visiting guest artists, pre-concert talks presented by area musicologists, invitations to guest artist master classes, and community ensemble events.

Community engagement and partnerships have played a vital role in the Symphony's operations for decades. In pursuit of building both bonding and bridging social capital, partnerships cover the artistic, educational, religious, and social services sectors. These partnerships are the basis for forming powerful and gratifying relationships that build trust, friendship, and help cross-promote the important work of the Symphony and its partners.

The Winston-Salem Symphony is governed by a highly engaged volunteer **Board of Directors** comprised of up to forty elected directors (currently thirty-two) and four voting *ex-officio* directors (President & CEO, Music Director, Orchestra Committee Chair, and Chorus Council Chair). This working board conducts business through a mix of governing committees, taskforces, and advisory bodies. Finally, a highly active and dedicated group of community volunteers also supports the Symphony at performances, in classrooms, and throughout the community.

REPORTING RELATIONSHIPS

The Chief Philanthropy Officer will report to the President & Chief Executive Officer, E. Merritt Vale and will serve as a member of the organization's Senior Leadership Team. The Chief Philanthropy Officer will supervise the Director of Philanthropy, co-supervise the Patron Loyalty Manager and Public Relations & Partnerships Manager in collaboration with the Director of Marketing, and manage contracted philanthropy support partners and vendors. The Chief Philanthropy Officer will work closely with the Vice President and Chief Operating Officer, Music Director, Vice President of Education & Engagement, Director of Marketing, and the Board of Directors.

FROM THE PRESIDENT & CHIEF EXECUTIVE OFFICER

On behalf of the Winston-Salem Symphony family, thank you for your interest in exploring our Chief Philanthropy Officer position. We appreciate that talented fundraising professionals have a multitude of choices when considering new opportunities, and through this note I hope to inspire your desire to learn more about ours.

The fact you are reading this suggests you are confident that you have more to offer, that you are a leader who is motivated to make a difference, and that you are bold enough to embrace the reality that an exciting alternative awaits you. If you also desire to build a mission-critical program with the power to transform an organization, then you are the leadership partner we are looking for.

You have access to other materials that profile the organization, our position, our beautiful region, and the multitude of professional and personal benefits we offer, so this introduction touches on what I believe makes the WSS exceptional and this opportunity compelling at this moment in time.

From my perspective, it all comes down to "heart," a tenacious commitment to service, and being willing to embrace the unexpected. Perhaps a glimpse into how my personal dedication to serving this wonderful organization has become my life's work will provide a window into what this means.

I have had the pleasure of living and working in fabulous places from coast to coast across our country. I joined the WSS as Interim Executive Director in 1998, following an accident-induced hiatus from a very satisfying career in banking and later with an international conglomerate, fully expecting I would return to the corporate world after temporarily leading the WSS through a transition. It is hard to imagine a more radical professional segue, but it changed my life in so many gratifying ways. I hope that the fact I still have the privilege of leading this team, alongside so many passionate and talented staff and board members, phenomenal musicians, and generous volunteers, speaks volumes about what a truly remarkable organization this is.

So, what is my answer about what makes the WSS exceptional and this opportunity compelling at this moment in time? The short answer is our people and their unwavering belief in the endless potential of this organization. Its potential to serve our entire community and to be innovative leaders in our field by embracing experimentation without fear of failure. Its potential to preserve a treasured time-honored art form, to support the creation of new music representative of our time by diverse artistic talents, firmly believing that great music is great music, regardless of its genre, making us relevant to all musical tastes and helping us unite communities when that has never been more essential. And our belief in its potential to deliver on the promise that that every child and every adult deserves access to music education.

Like many for-profit and non-profit organizations, the WSS is at what may be the most pivotal time in its 78-year history. We have accomplished a great deal, but the world around us is changing rapidly and we need visionary, tenacious leaders to help us chart a path forward. Philanthropy is squarely at the heart of achieving the dreams we have for our future success on stages, in classrooms, and throughout the communities we serve. We are very fortunate to live in a beautifully diverse region full of talent, opportunity, and exceptional generosity — our new CPO will join a team that is committed to tapping much more deeply into all these areas.

Our new Chief Philanthropy Officer inherits a strong and loyal base of generous patrons. Through their leadership we seek to steward these and new patron relationships to support our \$3 million budget through focused attention on increased levels of annual giving, major gift support, and planned gift cultivation that grows our current \$6 million endowment.

*We are all motivated by different things. I found a home here because my motivations align seamlessly with those of the WSS: a desire to serve, to make a tangible difference, and to enrich lives by connecting people from all walks of life through shared experiences that allow us to embrace our humanity. **The opportunity to join our team in pursuing these and other goals through your vital leadership as Chief Philanthropy Officer, and to bask in the gratifying sense of accomplishment that comes with it, is what I hope to be able to explore more fully with you.** Thank you again for your interest — we look forward to continuing the conversation.*

— E. Merritt Vale, President & CEO

WINSTON SALEM SYMPHONY'S COMMITMENT TO INCLUSION AND ACCESSIBILITY

The Winston-Salem Symphony has a long history of commitment to inclusion and accessibility yet appreciates that this is an ever-evolving process. The WSS began formalizing its commitment to inclusion in its 2020-2024 Strategic Plan. It deeply embedded this commitment to inclusion and accessibility throughout the four strategic imperatives of that plan and this commitment will again take center stage in the new strategic plan, which is under development. This commitment stretches from its participation in the League of American Orchestra's *Catalyst Incubator Grant*, designed to address and institutionalize sustained commitment to DEIAB and the League's *Inclusive Stages* project aimed at cultivating the diversity of its musicians (ongoing) to the Symphony's enhanced commitment to routinely represent diverse artists, composers, and musical styles, with special attention paid to programming the works of under-represented and unfamiliar composers. WSS has enhanced practices for identifying, cultivating, and recruiting members of the Board, staff, and volunteers who reflect the diversity of communities it serves, expanding its already strong commitment to local, state, and national arts, education, and social services partnerships that build bonding and bridging social capital.

PRIMARY RESPONSIBILITIES

The Chief Philanthropy Officer will

- develop, implement, and manage a multi-year fundraising plan that consistently grows sustainable philanthropic results through relationship cultivation and management strategies;
- strategically steward current philanthropic relationships to secure and strengthen commitment and cultivate new relationships that expand and diversify the funding base;

- develop philanthropic affinity groups, segmented by demographic, geographic location, and program interest;
- establish stewardship practices based on well-planned, individualized, high-touch experiences;
- develop innovative fundraising strategies that diversify revenue streams and expand the donor base through the effective use of fundraising resources by developing, tracking, and analyzing key performance indicators and other success measurement metrics, and strategically embracing fundraising technology to enhance the efficiency and effectiveness of fundraising operations;
- ensure timely, accurate, and secure donor communications, records, and gifts management;
- recruit and train Board and volunteer fundraisers, cultivating a culture of giving among Board members and other high-level volunteers that inspires them to action and strengthens their intellectual and emotional commitment;
- manage the philanthropy team's leadership of annual fundraising campaigns that meet or exceed budgeted fundraising goals from individuals, business and corporate professionals, foundations, other grantors, and periodic special events;
- develop, implement, and ensure readiness for major gift and planned giving and endowment growth initiatives and periodic major campaigns in close collaboration with the President & CEO;
- develop detailed plans for each program, tactically and strategically, by building and maintaining strong, long-term relationships with major donors through personalized engagement and stewardship strategies;
- manage an active portfolio of major and planned gift donors and prospects, developing individualized profiles for each one, systematically identifying, cultivating, soliciting, and stewarding new individual and institutional donors capable of making significant contributions;
- lead the development of a strategic vision for predictable, periodic major fundraising campaigns, both capital and comprehensive, and establish and implement plans and timelines to support these campaigns;
- manage the cultivation of a pipeline of partnerships that directly and indirectly produce philanthropic and earned revenue through cash and in-kind sponsorships, advertising relationships, public relations relationships, ticket sales, advocacy initiatives, and friend-raising and fundraising events;
- support external relations by maintaining membership in professional and civic associations and supporting relevant local, state, and federal advocacy initiatives;
- provide leadership and guidance to the philanthropy team, motivating and mentoring an outstanding team by fostering a culture of excellence, an environment of achievement based on strengths, and a climate that embraces diversity and promotes respect for others and alternative ideas; and
- serve as Staff Liaison to the Board's Philanthropy Committee.

LEADERSHIP

E. Merritt Vale

President & Chief Executive Officer

Merritt Vale joined the Winston-Salem Symphony in August 1998 as Interim General Manager, was appointed Executive Director in May 1999, and President & Chief Executive Officer in May 2010.

Driven by a passion for service and a firm belief in the power of music to inspire, comfort, and bind a community, her tenure is noteworthy for a wide array of accomplishments. Among the most notable are a commitment to fiscal integrity, increasing the Symphony's endowment by \$5 million, guiding the Symphony through the COVID-19 pandemic, expanding the Symphony's service to the community, leading three successful Music Director searches, and nearly doubling musician per service pay rates.

In partnership with artistic leadership, a phenomenal team, and a dedicated Board of Directors, her tenure includes the addition of the *Pops Series*; *Family Series*; *Handel's Messiah*; *Concert for Community* (free); introduction of the El-Sistema inspired in- and after-school Piedmont Learning Academy for Youth (P.L.A.Y.) Music Program providing free instrumental instruction and much more primarily to underserved youth; and expansion of the Youth Orchestras Program from two to four ensembles. Her tenure has also included special performances by internationally acclaimed classical and popular artists including Yo-Yo Ma, Renée Fleming, Itzhak Perlman, Van Cliburn, Joshua Bell, Sir James Galway, Robert McDuffie, Dame Evelyn Glennie, Denyce Graves, Chris Botti, Amy Grant, Rhiannon Giddens, Chris Thile, Judy Collins, Béla Fleck, Ricky Skaggs, the U.S. Naval Academy Men's Glee Club, and more.

Prior to joining the Symphony, Vale held management and internal consulting positions serving several RJR Nabisco business units including RJR Industries/RJR Nabisco, Kentucky Fried Chicken International, Nabisco Biscuit Company, and R.J. Reynolds Tobacco Company. Her accountabilities included strategic planning, business process reengineering, management of complex multi-business unit special projects, information technology litigation support, executive presentation and technical/user publication management, and computing and communications asset management. Previously, she held strategic planning and operational positions in the banking industry in Seattle, Washington, D.C., and Baltimore.

Vale served previously on the Board of Directors of Arts North Carolina, a statewide arts advocacy organization, and on the Board of Directors of the Arts Council of Winston-Salem/Forsyth County and of Carolina Chamber Symphony (now Music Carolina). She is a graduate of Scripps College in Claremont, California where she received her Bachelor of Arts degree in Asian Studies.

ARTISTIC LEADERSHIP

Michelle Merrill

Music Director

Michelle Merrill has been inspiring audiences throughout the country with her sharply detailed and vibrant performances. A passionate and dynamic artist, she served four years as the Assistant and then Associate Conductor of the Detroit Symphony Orchestra, where she also carried the title of Phillip and Lauren Fisher Community Ambassador.

In addition to her growing guest conducting schedule, Merrill currently serves as the Music Director of the Coastal Symphony of Georgia, where she has ignited the growth and expansion of the orchestra's offerings both on and off the stage.

Merrill's most recent and upcoming engagements include the National Symphony Orchestra, San Francisco Opera, Dallas Symphony Orchestra, National Arts Centre Orchestra (Canada), Minnesota Orchestra, River Oaks Chamber Orchestra, Cincinnati Pops Orchestra, Milwaukee Symphony Orchestra, Iceland Symphony Orchestra, Toledo Symphony Orchestra, Sarasota Orchestra, West Virginia Symphony, Symphoria (Syracuse), Princeton Symphony Orchestra, and the Round Top Music Festival Institute.

In past seasons, she has conducted concerts with the Indianapolis Symphony Orchestra, Toronto Symphony Orchestra, Jacksonville Symphony, Oklahoma City Philharmonic, Louisiana Philharmonic, Orlando Philharmonic, Sacramento Philharmonic & Opera, Boise Philharmonic, New Music Detroit, and the Northeastern Pennsylvania Philharmonic, where she formerly served as the Assistant Conductor from 2012 -2015.

During her four-year tenure as the Associate Conductor of the Detroit Symphony Orchestra, she helped plan a wide variety of concerts each season, including the renowned educational webcasts, which have reached over 100,000 students to date in classrooms throughout the nation. Merrill also gave pre-concert lectures, led adult music education seminars, engaged with students and adults in and around Metro Detroit, spoke on behalf of the DSO throughout the community, and participated in hosting Live from Orchestra Hall, the DSO's free concert webcast that launched in 2011 and is now watched in more than 100 countries.

Merrill is a proud recipient of a 2016 Solti Foundation U.S. Career Assistance Award as well as the prestigious 2013 Ansbacher Conducting Fellowship as awarded by members of the Vienna Philharmonic and the American Austrian Foundation, which enabled her to be in residence at the world-renowned Salzburg Festival. Born in Dallas, Texas, she studied conducting with Dr. Paul C. Phillips at Southern Methodist University's Meadows School of the Arts, where she holds a Master of Music Degree in conducting and a Bachelor of Music in performance.

PREFERRED COMPETENCIES AND QUALIFICATIONS

The Winston-Salem Symphony seeks a Chief Philanthropy Officer with

- a commitment to the mission of the Winston-Salem Symphony—to bring music to life by enriching the community with live music;
- a history of personally closing and sustaining major gifts and grants from individuals, corporations, and foundations;
- experience working with high-net-worth individuals and corporations;
- an ability to develop a powerful sense of shared purpose in others and to motivate donors at all levels to support current and future opportunities and challenges;
- outstanding oral and written communication skills across platforms, including experience crafting compelling cases for support;
- exceptional interpersonal skills, with an ability to build effective relationships with diverse stakeholders;
- planned giving, endowment building, and campaign management experience;
- an understanding of fundraising best practices, ethical standards, and regulatory requirements in the non-profit sector, and familiarity with the local, state, and national non-profit philanthropic landscape;
- strategic thinking skills and an ability to develop and execute innovative fundraising strategies that drive results;
- an intense desire to lead and to innovate;

- a results-driven, resourceful, and action-oriented approach;
- excellent planning, organizational, research, and analytical skills;
- flexibility and creativity;
- an ability to build, supervise, and motivate teams and individuals in a collaborative manner;
- an ability to thrive in a collaborative, but intense and fast-paced work environment; and
- technological savvy including Microsoft Office skills and experience with fundraising/CRM software (experience with Patron Manager/Salesforce a plus).

A bachelor's degree or an equivalent combination of education and experience and at least seven years of fundraising experience, including at least two years of direct supervisory experience, is preferred for this role. The Winston-Salem Symphony will consider candidates with a broad range of backgrounds. If you are excited about this role and feel that you can contribute to the WSS, but your experience does not exactly align with every qualification listed above, we encourage you to apply.

SALARY AND BENEFITS

The salary range for this position is \$120,000 to \$125,000 annually. The Winston-Salem Symphony offers a comprehensive package of benefits including medical, dental, vision, and short- and long-term disability insurance; life insurance equal to one-time annual salary; 21 days of paid time off (PTO) plus 11 paid holidays; and opportunities for professional development.

LOCATION

This position is in Winston-Salem, North Carolina.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of the Winston-Salem Symphony and the responsibilities and qualifications specified in the position prospectus.*** Review of applications will begin immediately and continue until the successful candidate has been selected.

To apply for this position, visit: [Chief Philanthropy Officer, Winston-Salem Symphony](#).

To nominate a candidate, please contact [Anne Johnson](#).

All inquiries will be held in confidence.